


# Kinetic Sales Management

- 
- A man in a grey suit and a woman in a purple top and grey trousers are walking towards the camera in a bright, modern office hallway. Other people are visible in the background, and there are modern chairs on the right.
- Estimating and Quotation Management
  - Order Management
  - Sales Order Automation
  - EDI/Demand Management
  - Point of Sale
  - Epicor Commerce Connect
  - Dealer Portal
  - Configure Price Quote

**Gold Partner:**



The Epicor Sales Management module delivers a comprehensive suite that helps enable you to produce accurate estimates, streamline your order-to-cash cycle, and fulfill orders that help ensure world-class customer satisfaction. Epicor Sales Management automates and improves labor-intensive processes for quoting, proposal generation, configuration, and order entry—helping to enable you to improve sales productivity by increasing accuracy during the quote and order process and identifying the right solution to meet customers' needs.

## Estimating and Quotation Management

Easily generate and track all customer or prospect requests for quotation (RFQs)— from the time of receipt until an order is placed. Create estimates and get quotes out more quickly with more accurate pricing and lead times with a wide range of powerful tools.

### Estimating Management

Generate cost-based estimates easily utilizing the tree interface to drag-and-drop components, operations or materials from another quote, Bill of Materials (BOM) or previous job. Pull same-as-except type parts into the estimate, then modify them quickly and easily to create a new one. Calculate material, subcontract, labor, and burden costs for multiple quantities of a part. Perform realistic cost estimating with the ability to add any special charges (e.g., tooling or design), minimum lot charges, price breaks, and scrap factors on materials and subcontracting. Specify and store individual markups for material class, subcontracting, operations, and special costs. Create RFQ requests to trigger buyers to solicit suppliers for pricing of materials required in the estimating process. Review responses once submitted for inclusion in the estimate. When the order arrives, punch a few keys and the detailed routing will be ready to go to the floor or to make additional changes.

### Collaborative Estimating

Connect with engineers and other subject matter experts from the field. Collaborate helps to drive more accurate and timely estimates by enabling engineers to be part of a group that sales and estimators can collaborate with electronically. Share knowledge and discuss best options for customers leveraging up-to-date ERP information.

### Quotation Management

Manage the sales cycle with dynamic task lists that help ensure the right people are working on the quote at the right time. Use the Part Advisor to drill down into the quote/job/ part status and history to answer critical questions related to a part:

- Have I quoted it before?
- Are there current orders for it?
- Have I run it before?
- Am I currently running it?
- Do I have any in inventory?
- Is part profitability available?

Instantly query summary and detailed information on an estimate/quote. Check inventory availability and easily cross- reference customer part numbers to your part numbers automatically during the quoting

process. Send quotes to prospects, even if they don't exist in the customer file. Quotation management capabilities include;

- Standard Routings
- Drag-And-Drop Interface
- Realistic cost estimates with minimum lot charges, price breaks, and scrap factors on materials and subcontracting
- Inventory Availability
- Request Supplier RFQ
- Markups by Category

### SecturaSOFT

Our partnership with SecturaSOFT offers SecturaFAB, an integrated metal fabrication estimating and quoting application that drastically speeds up turnaround times for estimates and quotes. It provides powerful nesting logic and data visualization tools that address historically labor-intensive and time-consuming processes. SecturaSOFT also offers a solution for printing and packaging organizations called SecturaPAQ.

### Pipeline Management

Accurately predict pipeline activity by tracking the confidence levels (e.g., best, worst, most likely) by quote line with the ability to perform management overrides to optimize forecast accuracy. Track all competitors to find out where you are winning and why you may be losing.

### Order/Job Integration

Increase efficiency and accuracy with the ability to quickly transfer quote information to a sales order or job. Built with tremendous flexibility, there are multiple ways to process an order and job from an existing quote such as:

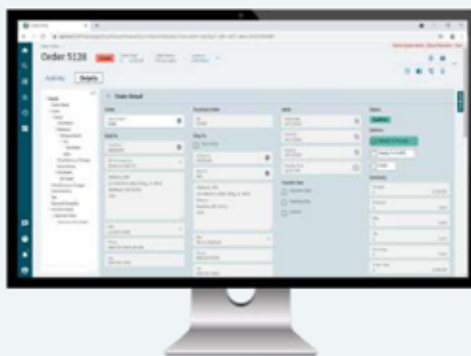
- Push to an order by the line item
- Flag as won, automatically generating an order
- Pull from Order Management with the capability to define specific lines and quantities desired

### Order Management

Order Management drives the Epicor system. From the time an order is entered, its progress is tracked through final shipment, producing order fulfillment on demand for maximum customer satisfaction. The Order Job Wizard generates appropriate jobs for new orders in a single step that enables the user to create, plan, schedule, and release jobs against multiple lines and multiple releases. Effectively manage orders with the ability to apply order-based discounts on an order value or product quantity basis. Optionally override and lock pricing. Check customer credit status online at quote



entry, order entry, and shipment entry. Using blanket orders establish multiple releases (either firm or not firm) for each sales order line and pull parts directly from inventory. Optionally lock the order line quantity allowing new releases to decrement the final delivery quantity on the final delivery date, keeping the total line quantity in balance with the release. Simplify repeat orders with the Copy Order function including the ability to optionally build a new order from history or see previous orders and enter the quantity on the order form. Use Available-To-Promise to view running balances during order entry. Enter a quantity, and the system will find the earliest date that quantity will be available. Enter a date, and see how many parts are available on that day.



*Order Management—Manage sophisticated sales requirement—from the time an order is entered until final shipment.*

Counter Sales allow you to automate the pick-up, shipment, and generation of sales invoices for walk-in customers. Additional capabilities include;

- Tax calculations and fields are available at the sales order, line, and release levels.
- Application for payment may be required from a different customer than the customer order/receiving the goods or bill third-parties, such as a customer of your distributor.
- Manage sales commission calculations for direct and indirect sales teams.
- Allocate commission percentage over multiple sales entities per order line.
- Generate customer, product group, warehouse, and products specific pricing hierarchies, while matching the end-user currency. For global enterprises, company, plant, and warehouse pricing offers flexibility in pricing products.

- Enter unlimited miscellaneous charges or credits on each order header or order line. These charges will then print on the order and carry over to invoicing
- Link sales orders to Projects.

### Sales Kits

Flexibility in selling items in kits includes configured item kits, optional price rollup and item substitution, mandatory ship complete, and optional printing of kit components on the packing slip and invoice. Use the answers from the kit master to “on the fly” configure individual kit components, automating kit instructions for features like style, color, and size. Configure a Kit within a Kit functionality support the ability to define multilevel configured sales kits that include non-stock components generated on a job or purchased direct for the kit, alongside stocked components.

### Selling Dimensional Products

Selling items with many dimensional attributes can be complex and make it difficult to implement ERP. For these manufacturers and distributors, Epicor offers the Advanced UOM module that reduce the complexity of implementation by reducing the amount of configuration needed to fit these unique needs. The benefit of Advanced UOM functionality is that it delivers a simplified approach to finding the right inventory by segmenting inventory with inventory attributes such as hardness, strength, modulus of elasticity, or density. Because the inventory is segmented, it is easily located, physical counts are more meaningful, and the business can plan inventory needs at the attribute level, ensuring accurate supply and demand are met.

### Up-Sell, Cross-Sell, and Down-Sell

Improve order accuracy and ability to enhance sales with Up-sell, Cross-sell, and Down-sell capabilities. At time of sales order entry, users are prompted with suggestions for “Upgrades,” “Downgrades,” “Substitutes,” and “Complements.” Whether substituting the original part with an upgrade or downgrade or adding complementary products; improved customer satisfaction alongside enhanced sales is the return.

### Capable-To-Promise

Provide accurate, real-time delivery dates to customers when using Advanced Planning and Scheduling (APS). Furnish a realistic promise date to your customer by finding out how a quote would fit into your current schedule. For multilevel structured products, Capable-To-Promise can be configured to create the sublevel assembly structures in addition to the top level assembly.



## Fulfillment and Allocation Processing

Use the Fulfillment Workbench for allocation or reservation and distribution processing, and plan for sales, transfers and job order types. Various fulfillment techniques, such as pick and pack, console-driven, and pre-pack processes may be performed through the use of templates to automate the fulfillment process. Hard allocation to finite level, versus reservations processing, may be launched directly from the order, line, and release areas as well. In conjunction with the fulfillment process, cross-docking provides the ability to directly link future inbound supply of items from purchase orders or jobs directly to demand from sales orders, transfer orders, or jobs. When the cross-docked items are received, they are immediately directed to the demand they are linked to, minimizing the time and task to fulfill the order or job.

## Order Shipment Parameters

Order Shipment Parameters With Order Management, all orders and change orders will be effectively managed online, helping to perfect the order-to-delivery process for maximum customer satisfaction. Set up the appropriate shipping parameters including the ability to manage;

- Track multiple ship-to addresses per order release.
- Ship an order from multiple plants and multiple warehouses.
- Do a one-time shipment to an address in Order Entry.
- Drop Ship and Buy to Order provides the ability from within a sales order to define a part as being "Buy-to-Order. This may or may not be defined as a drop ship item. In both cases, the purchase order will be linked to the sales order directly.
- Automatically create backorders for lines shipped incomplete. Flexibility enables customer-specific backorder parameters for complete order lines or complete orders to be set.

## Credit Card Processing

Credit Card Processing includes easy to use maintenance for initial setup along with a variety of integration points to bring an easily deployable solution to your business that meets the security guidelines as specified in the Payment Card Industry Data Security Standard





including securely encrypted account numbers and key management. Epicor Sales Management uses Credit Card Processing to support authorization with the sales order, reauthorization with the sales order before picking and shipping, and complete or partial funds collected with the sales order.

### Order Monitoring

Use order tracker to see a summarized view of the order, drill down on selected items to see greater details (e.g. lines, releases, shipments, charges, bookings, audit, and payment information). Monitor and track changes to orders using Collaborate. Easily subscribe to notifications about changes to orders without building Business Process Management (BPM) controls. View a summary of all the changes to the order in an activity stream inside or outside Kinetic or receive social media style updates via Email or directly in your browser.

### Sales Order Automation

Sales order entry is part of nearly all manufacturing operations, setting the tone if not the speed for the entire process. Too often, sales order entry is done manually, which is labor-intensive and time-consuming, costing valuable employee resources, depending on the complexity of the order. Differences in the way orders are received—whether via mail, faxes, or email; as paper, PDFs, spreadsheet, or other electronic files—adds to the confusion and creates opportunities for errors.

Since sales order entry is a critical part of the sales transaction, it makes sense to automate the process and eliminate many of the errors associated with manual sales order entry. A module in the Epicor Enterprise Content Management suite, Sales Order Automation (SOA), takes the extra work and worry out of sales order entry.

The process is as follows:

- **Capture** – Intelligent Data Capture (Epicor IDC) captures and extracts sales order data such as customer, order data and line items
- **Validate** – SOA performs a data lookup in Kinetic to confirm customer, quote, and other validations. Data exceptions are passed to a worker to resolve.
- **Process** – If all conditions are met, the order is created in Kinetic

**Note:** Refer to the “Cloud Business Architecture” chapter for more information about the Enterprise Content Management (Epicor ECM) suite of products.

## EDI/Demand Management

Today, all suppliers large and small are facing increased expectations from their customers to have systems in place for immediate response to changes in their demand such as forecast and shipping schedule changes. Epicor EDI/Demand Management secures your competitive edge by incorporating electronic data interchange (EDI) with demand scheduling. The EDI/Demand Management framework leverages the SOA business architecture of Kinetic and deep industry experience in EDI to lower the cost of EDI deployment. The framework provides full flexibility and control for setting up customer contracts and handling their schedules once inside the Kinetic system, whether entered manually in Demand Management or contained in EDI messages. This helps your company reduce lead time and effort for planning and procurement, thus enabling you to respond on the production floor faster. A wide range of EDI implementation choices are available to match your company’s needs, making it possible to preserve much of your investment in EDI setup and existing staff.

### Demand Management

A component of the embedded EDI/ Demand Management module, Demand Management starts with a “contract” set up per customer with such agreed-upon parameters as pricing, initial demand schedule, and contract end date. The contract is then linked to incoming purchase orders, forecasts, and shipping schedules.

These contracts can be managed, and schedules produced, automatically with set periodicities or schedule constraints that match each customer’s unique shipping needs. Additionally, as changes happen, the schedules can be updated, and changes matched to existing sales orders, which are then updated accordingly. You can use Demand Management without EDI, and if EDI is deployed, your customers’ electronic demand changes are brought in automatically for system review and acceptance into sales orders or forecasts in your Kinetic system, according to parameters and tolerances you specify. This is especially important for companies doing business in automotive as well as other industries such as industrial, consumer products, retail, and aerospace and defense.

Demand Management capabilities include;

- Demand Contract structure provides the ability to have many sales orders/ lines attached to the contract.
- Demand Entry Management Console supports one inbound purchase order at a time, or options can be tuned for more automated entry into the Kinetic system.

- Establish demand settings per trading partner to include tolerances, such as for allowable time windows when schedule lines can be added or deleted or changed, tolerances for price variations, parameters for matching changes against existing sales orders, and functions for reconciling shipped quantities between you and your trading partner. Automated Demand Management processing can be set to always process in spite of tolerance errors, process with warnings, or stop when an error is encountered.
- Use Demand Mass Review to manually match incoming forecast and shipping schedule changes to existing forecasts and sales order lines in the Kinetic system. Configurable matching algorithms help to speed up the matching process.
- Manually generate sales order release schedules based on defaulted customer periodicity (interval setup) and release quantity. Automatically close rejected schedules from the customer record.
- Review balances as well as proposed quantity of proposed schedule.
- Manage and reconcile the cumulative shipped quantity. Validate cumulative quantity discrepancies by customer and choose to “Stop” or “Warn” and then allow the received demand to be turned into a valid sales order—this feature includes Cumulative Variances Reporting. The Demand Reconciliation screen helps in the cumulative matching process with the ability to easily make reconciled quantity adjustments. Cumulative quantities are tracked at the order and shipment levels over the life of the contract.
- Schedule forecasted deliveries that can be utilized with MRP to predict demand for resources and provide guidance on pending demand for materials.
- Periodicity (Interval Setup) - Specify rules by plant or plant/supplier for automatic purchase schedule suggestions. Periodicity rules can be specified as Daily, Monthly Forward, Weekly Forward, and Nth Day of Week.
- Capable-to-Promise - Set up the system to review open contracts and capacity requirements for a product and automatically adjust the new demand requirements after reviewing against open contracts as well as available capacity.



- Support for Allowance and Charge Codes - Optionally receive and process allowances and miscellaneous charges within EDI transmissions from trading partners. Both flat amounts and percentage based charges are available.
- Automated Order Match Validation - Automatically cancel demand releases received that are not matched to a specific order release.
- Close and Process Schedules - Use a single step to automatically close and process all schedules within Demand Management.
- Contract Start and End - Manage contracts effectively with contract start and end date.





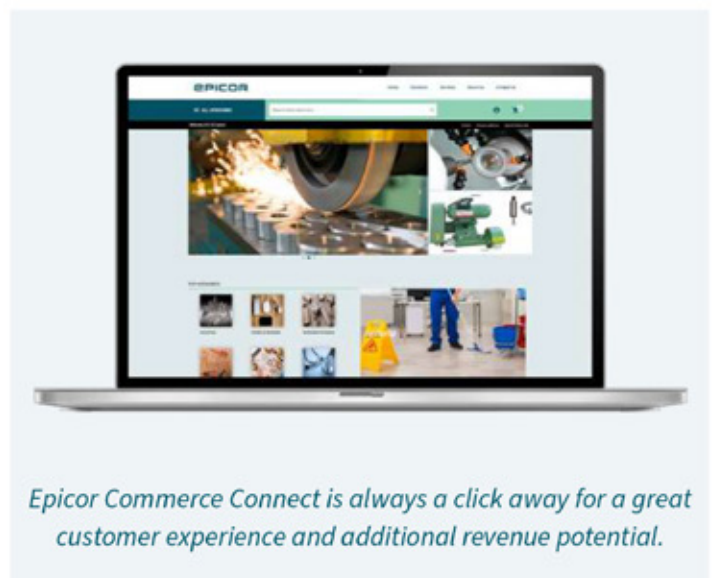
## EDI Standard Transactions

The Kinetic system framework readily supports the following listed standard ANSI X12 and EDIFACT documents. Many more are available from the Epicor EDI Solutions Team, who are experienced in making EDI work in various environments and can offer enhanced functionality that is tailored to the EDI needs of your business.

**Note:** Refer to the “Cloud Business Architecture” chapter for more information about the Epicor EDI solution for EDI and B2B integration.

## Point of Sale

Epicor Point of Sale (POS) extends the power of your Kinetic solution to a customer-facing sales environment—whether you’re an organization with a single POS station or a large, multinational chain with hundreds of stores. Epicor POS provides a feature-rich system that empowers store personnel to provide an enhanced customer experience. Comprehensive functionality includes electronic gift cards, gift receipting, customized receipt per transaction type, coupon redemption/issuance, layaways, special orders, suspend and resume, item marking for various functions, additional input fields, multicurrency, start/end of day functions, cash management, and more.



*Epicor Commerce Connect is always a click away for a great customer experience and additional revenue potential.*

## Epicor Commerce Connect

The increasing proliferation of eCommerce likely means that more of your customers are looking online to solve their business problems, which means that providing customers with the ability to buy online from you is just a start. Your Web site must provide an experience that truly does solve problems, or better yet, inspires them in some way to keep coming back. Whether your Web site serves Business-to-Consumer (B2C), Business-to-Business (B2B), or both needs, it requires strong functionality and must use the latest technology to deliver customers the best

possible online experience. Epicor Commerce Connect provides everything your Web site needs to deliver a rich customer experience, throughout the customer's entire order life cycle—from quote to fulfillment to service.

The key advantage of Epicor Commerce Connect is its deep integration to Kinetic. Epicor Commerce Connect negates much of the risk that goes with using a non-integrated eCommerce solution by getting all of its information direct from the ERP platform. All transactional data flows seamlessly between Epicor Commerce Connect and Kinetic: product information, customer specific pricing, inventory levels, and more, can be viewed online via Epicor Commerce Connect. Multiple Epicor Commerce Connect offerings are available, offering you a choice of capabilities to match your current digital online strategy and gives you the ability to upgrade as you experience business growth.

- Express – affordable, quick to implement, B2B online customer self-service portal that enables you to establish a web presence without the responsibility of full eCommerce. Your customers can view documents like RFQs, invoices and more.
- Base – fixed set of options that includes the ecommerce functionality most users need – multiple themes, fixed payment options, seven 'certified extensions' and standard implementation hours.
- Advanced – express your brand online and maximize your omnichannel ecommerce presence with custom themes, full extensibility and a full feature set.

While many companies can provide eCommerce services, very few are able to deliver the value and rapid results the way that Epicor Commerce Connect can.

### A Modular Approach to a Better Web site

Whether you are selling to the general public, or to other businesses, Epicor Commerce Connect has been designed to help you provide all visitors to your site(s) with the same high levels of user experience they have come to expect in today's online environment. Browsing tools such as configurable search, suggested items and automatically updated listings of popular products on your site are able to help your customers very quickly get to the items they wish to purchase, while at the same time ensuring that they are exposed to as much of your product range as possible—all in ways that are relevant and tailored to customer interests

You can also provide tools to help your customers make better purchasing decisions including the ability for customers to:

- View and compare different and related products
- Customize products
- View the product up close using the product image zoom-in capability

Tools such as these allow the customer to make better purchase decisions, which in turn lead to much higher levels of customer satisfaction and a lower rate of product returns.



*Dealer Portal—Capture all dealer activity through a single, easy-to-use portal.*

## Dealer Portal

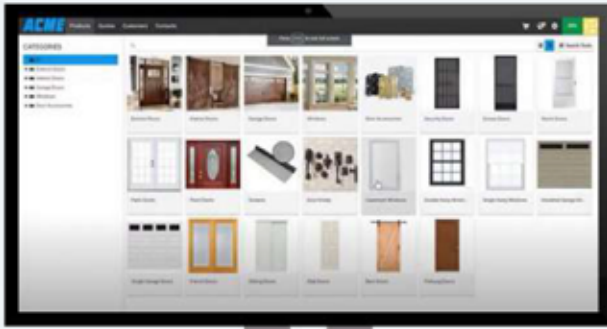
Epicor Dealer Portal is an innovative enterprise solution designed for manufacturers who sell or service products through dealers. Powered by Epicor Commerce Connect and tightly integrated with your Kinetic platform, Dealer Portal creates a modern online experience for your dealers to rapidly configure, price, and quote orders, as well as manage service and warranty needs for your products.

By capturing all dealer activity through a single easy-to-use portal, you establish a single thread of data that connects all transactions at the dealer with your back-end ERP. You gain full visibility into the business making it simpler for dealers, which helps enable you to drive business growth as a preferred innovative brand.

## Epicor CPQ (Configure, Price, Quote)

Epicor CPQ is the configure, price, quote solution that makes it easy for manufacturers to sell complex, configurable products. It covers all the bases both on and offline:





- **Visual Product Configuration:** Enables digital self-service and brings buying experiences to life
- **Dynamic Pricing:** Slashes sales cycles to seconds and eliminates manual calculation errors
- **Quote Automation:** Frees sales teams from the burden of Excel, letting them concentrate on active selling

But Epicor CPQ does more than just configure, price, quote. It has functionality that extends way beyond sales to engineering and the shop floor. It is a one-stop solution for manufacturers of ETO products with a diverse range of advanced features, from CAD automation to augmented reality.

With Epicor CPQ, manufacturers can provide customers with a fully immersive buying experience and an endless variety of customization possibilities. At the same time, automated workflows reduce sales-to-manufacturing complexity on the backend.

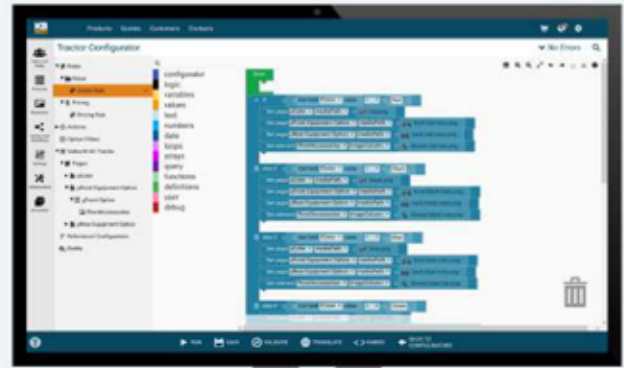
Integrating with Commerce Connect or directly to Kinetic—the backbone of your information system—lets you synchronize the complex relationships and data that determine supply, demand, and fulfillment. You can gather information from your mobile employees, eCommerce store, plant floor, and warehouse to get sales and manufacturing working together.

## Epicor CPQ's Standout Features

### The Snap Rules Engine

Product and pricing rules—the logic that dictates how products can be configured, priced, and sold—are created using a no-code visual programming language called Snap. Rather than typing out long lines of code, users simply “Snap” together interlocking blocks to form logic statements.

Having a centralized set of product and pricing rules gives your teams the confidence they need to configure products fast. Whether an experienced sales rep, a new hire, or an online customer is carrying out the configuring, outputs are guaranteed to be technically viable and optimized.



## Visual Product Configuration: Immerse Customers in the Buying Experience

Salespeople and online customers can configure products using a visual product configurator. They can drag and drop to change colors, dimensions, parts, and materials. Rather than imagining what their finished products might look like, they can see them on-screen before ordering, which boosts the conversion rate by an average of 40%.

Embedding a visual product configurator onto your website lets customers self-serve any time, any place, through any device.

## Generate Quotes Quickly and Accurately

Shorten the sales cycles and relieve pressure from engineering with the ability to build quotes quickly and easily, with a visual guided experience. Options chosen during configuration automatically make their way into the quote, along with auto-generated proposal drawings and other supporting documents.

## Give Real-Time Pricing

Provide pricing to users immediately, while configuring products in real-time. Our controlled ordering experience ensures anyone can produce an accurate quote, no matter the complexity of the product being sold. Update pricing based on any factor, including complex pricing scenarios, discount, and approval workflows, and leveraging data from external sources like your databases, pricing tables, or ERP.

### **Automate Proposal Drawings and CAD files**

Allow Sales to sell, and Engineering to focus on design. Your product configurator can auto-generate proposal drawings for Sales, while also providing CAD file outputs for Engineering, relieving pressure for both teams. We work with the most popular CAD platforms, like SolidWorks, Autodesk, and PTC.

### **Auto-generate Manufacturing Documents**

Our workflows can generate and send manufacturing documents like BOMs, cut sheets, inventory status, shipping, assembly, and other key outputs for your manufacturing process. Since all outputs are auto-generated directly from product configuration output, you can be assured your shop floor has just what it needs to meet the exacting demands of your customers and distributors.

### **Integrate Buying with Core Processes and Systems**

Connect your configure, pricing and quoting to your entire organization. Epicor CPQ Connector and MuleSoft integrations allow you to easily push and pull data from your Kinetic solution or Epicor Commerce Connect, eCommerce, CRM/CPQ platforms, CAD systems, your PLM, or other apps, databases, and proprietary systems.

### **Gather Insights that Help all of your Teams**

Collect key user experience data and push it to your preferred analytics platform, to answer your burning questions about your buyers and their engagement. Find out how your products are being configured to optimize your sales and manufacturing processes.

